

INTERACTIVE PRODUCT SELECTOR

Background of The Invention

1. Field of the Invention

5 This application relates to electronic commerce, and more particularly, to an interactive, Web-based product selector to assist online shoppers with purchasing decisions.

2. Description of Related Art

10 Online shopping for goods and services on the Internet, and its graphical offspring, the World Wide Web ("Web"), is growing at a tremendous rate. An increasing number of retailers, and more recently, manufacturers, offer products and service over the Internet. Furthermore, even when purchases are through more traditional "brick-and-mortar" retail outlets, consumers frequently research products online prior to the purchase
15 event.

 Various Web sites have been developed in an attempt to address online research and purchasing. In the case of manufacturer's direct sales through the Internet, one or more pages may be provided through which a consumer may specify product features.
20 As a significant disadvantage, these sites constrain an online shopper to a single product source, i.e., the manufacturer. Other sites, such as "Active Buyer's Guide", aggregate products from various sources within a category, and walk a consumer through a series of trade-offs between product features and costs. As a significant disadvantage, such sites force a consumer to explicitly weight importance of various feature selections, and

require navigation through a series of separate HTML pages. This may significantly detract from the consumer's shopping experience since it is time consuming, and since it may burden a shopper with a series of difficult decisions.

5 There remains a need for an interactive product selector for use by consumers of goods and services that provides a positive user experience while providing valuable guidance to the user during a selection process.

Brief Description of Drawings

10 The foregoing and other objects and advantages of the invention will be appreciated more fully from the following further description thereof, with reference to the accompanying drawings, wherein:

Fig. 1 shows a schematic diagram of the entities involved in an embodiment of a method and system disclosed herein;

15 Fig. 2 shows a block diagram of a preferred embodiment of a server;

Fig. 3 shows a home page according to the principles of the invention;

Fig. 4 shows a product selection page according to the principles of the invention;

Fig. 5 shows a product selection page according to the principles of the invention;

Fig. 6 shows a product set selected according to the principles of the invention;

20 Fig. 7 shows a product set revision page according to the principles of the invention;

Fig. 8 shows a process for selecting products according to the principles of the invention; and

Fig. 9 shows a product set generation process according to the principles of the invention.

Summary Of The Invention

5 In accordance with the principles of the invention, there is provided an interactive product selector for assisting customers with purchasing decisions. A single page is presented to a user that includes feature selections to be made by the user. A panel within the page may be dynamically updated to provided suggestions and guidance concerning each feature selection without requiring a new page to be transmitted to a client device.

10 Further, a user session may be tracked, and fuzzy logic applied to include information about changes in feature selections so that this information may be used to assist in generating a product set. The product set, which includes products meeting user specified criteria, may then be reviewed in detail. The product selection session may culminate in fulfillment of a customer order.

Detailed Description of the Preferred Embodiment(s)

To provide an overall understanding of the invention, certain illustrative embodiments will now be described, including an online product selector for consumer products and an online product selector for financial products. However, it will be

20 understood by those of ordinary skill in the art that the methods and systems described herein can be suitably adapted to other business categories such as insurance products, services, or any other business wherein a purchaser may select between a number of different products or services within a category. The methods and systems described

herein are particularly suitable to those businesses where a consumer may require explanation or assistance in distinguishing between a number of options for a product feature. The terms “product” and “service”, as used herein, are intended to refer generally to products, goods and/or services, unless a particular meaning is specifically
5 stated.

Figure 1 shows a schematic diagram of the entities involved in an embodiment of a method and system disclosed herein. In a system 100, a plurality of clients 102, servers 104, and providers 108 are connected via an internetwork 110. It should be understood
10 that any number of clients 102, servers 104, and providers 108 could participate in such a system 100. The system may further include one or more local area networks (“LAN”) 112 interconnecting clients 102 through a hub 114 (in, for example, a peer network) or a local area network server 114 (in, for example, a client-server network). The LAN 112 may be connected to the internetwork 110 through a gateway 116, which provides
15 security to the LAN 112 and ensures operating compatibility between the LAN 112 and the internetwork 110.

In one embodiment, the internetwork 110 is the Internet, and the World Wide Web provides a system for interconnecting clients 102 and servers 104 through the
20 Internet 110.

An exemplary client 102 includes the conventional components of a client system, such as a processor, a memory (e.g. RAM), a bus which couples the processor and the

memory, a mass storage device (e.g. a magnetic hard disk or an optical storage disk) coupled to the processor and the memory through an I/O controller, and a network interface coupled to the processor and the memory, such as modem, digital subscriber line ("DSL") card, cable modem, network interface card, wireless network card, or other interface device capable of wired, fiber optic, or wireless data communications. One example of such a client 102 is a personal computer equipped with an operating system such as Microsoft Windows 95, Microsoft Windows NT, or Unix and its variants, along with software support for Internet communication protocols. The personal computer also includes a browser program, such as Microsoft Internet Explorer or Netscape Navigator, to provide a user interface for access to the Internet 110. Although the personal computer is a typical client 102, the client 102 may also be a workstation, mobile computer, Web phone, television set-top box, interactive kiosk, personal digital assistant, or other device capable of communicating over the Internet 110. As used herein, the term "client" is intended to refer to any of the above-described clients 102, and the term "browser" is intended to refer to any of the above browser programs or other software or firmware providing a user interface for navigating the Internet 110.

In one embodiment, the client 102 is an Internet enabled television set-top box, such as that sold by WebTV. In this embodiment, the client 102 may include, for example, a wireless keyboard and a wireless mouse, or some other graphical user interface device, communicating with the set-top box over an infrared communication link. Such a client 102 may be connected to the internetwork 110 through the cable television infrastructure, with a data back channel used for communication from the

client 102 to the internetwork 110. An Internet point-of-presence may be established at a cable head-end, or at some other location within the cable television infrastructure. In this embodiment, navigation to an interactive product selector page may be similar to, or identical to, navigation as described below for any other client device. Alternatively, a
 5 separate interface and/or site may be provided. This may have particular applicability where, for example, a set-top box does not include software or hardware for receiving plug-ins and other supporting software that might be required to render a particular page.

One embodiment of a client 102 may be a Wireless Access Protocol
 10 (“WAP”)/Wireless Markup Language (“WML”) device. Such a client 102 may be connected to the internetwork 110 through a direct connection to a WAP/WML server that is configured to respond to WML requests with WML compatible content, or the client 102 may be connected to the internetwork 110 through a WAP/WML gateway that operates to translate content and requests between WAP/WML and HTTP forms. It will
 15 be appreciated that a WAP/WML client may have a lower data rate than other devices for connecting to the internetwork 110, and that a WAP/WML device may have other physical characteristics that differ from a personal computer client, such as a smaller screen size, limited audio output, and slower text input modalities. As such, separate content may be provided at an interactive product selector site for such a client 102.

20

An exemplary server 104 includes a processor, a memory (e.g. RAM), a bus which couples the processor and the memory, a mass storage device (e.g. a magnetic or optical disk) coupled to the processor and the memory through an I/O controller, and a

network interface coupled to the processor and the memory. Servers may be clustered together to handle more client traffic, and may include separate servers for different functions such as a database server, an application server, and a Web presentation server. Such servers may further include one or more mass storage devices such as a disk farm or a redundant array of independent disk ("RAID") system for additional storage and data integrity. Read-only devices, such as compact disk drives and digital versatile disk drives, may also be connected to the servers. Suitable servers and mass storage devices are manufactured by, for example, Compaq, IBM, and Sun Microsystems. As used herein, the term "server" is intended to refer to any of the above-described servers 104.

Focusing now on the internetwork 110, the presently preferred embodiment is the Internet. The structure of the Internet 110 is well known to those of ordinary skill in the art and includes a network backbone with networks branching from the backbone. These branches, in turn, have networks branching from them, and so on. The backbone and branches are connected by routers, bridges, switches, and other switching elements that operate to direct data through the internetwork 110. For a more detailed description of the structure and operation of the Internet 110, one may refer to "The Internet Complete Reference," by Harley Hahn and Rick Stout, published by McGraw-Hill, 1994. However, one may practice the present invention on a wide variety of communication networks. For example, the internetwork 110 can include interactive television networks, telephone networks, wireless data transmission systems, two-way cable systems, customized computer networks, interactive kiosk networks and automatic teller machine networks.

One embodiment of the internetwork 110 includes Internet service providers 108 offering dial-in service, such as Microsoft Network, America OnLine, Prodigy and CompuServe. It will be appreciated that the Internet service providers 108 may also include any computer system which can provide Internet access to a client 102. Of course, the Internet service providers 108 are optional, and in some cases, the clients 102 may have direct access to the Internet 110 through a dedicated DSL service, ISDN leased lines, T1 lines, digital satellite service, cable modem service, or any other high-speed connection. Any of these high-speed services may also be offered through one of the Internet service providers 108.

In its present deployment as the Internet 110, the internetwork 110 consists of a worldwide computer network that communicates using the well-defined Transmission Control Protocol ("TCP") and Internet Protocol ("IP") to provide transport and network services. Computer systems that are directly connected to the Internet 110 each have a unique IP address. The IP address consists of four one-byte numbers (although a planned expansion to sixteen bytes is underway with IPv6). The four bytes of the IP address are commonly written out separated by periods such as "209.67.50.253". To simplify Internet addressing, the Domain Name System ("DNS") was created. The DNS allows users to access Internet resources with a simpler alphanumeric naming system. A DNS name consists of a series of alphanumeric names separated by periods. For example, the name "www.mypersonaladvocate.com" corresponds to a particular IP address. When a

domain name is used, the computer accesses a DNS server to obtain the explicit four-byte IP address.

To further define the resources on the Internet 110, the Uniform Resource Locator system was created. A Uniform Resource Locator (“URL”) is a descriptor that specifically defines a type of Internet resource along with its location. URLs have the following format:

resource-type://domain.address/path-name

where *resource-type* defines the type of Internet resource. Web documents are identified by the resource type “http” which indicates that the hypertext transfer protocol should be used to access the document. Other common resource types include “ftp” (file transmission protocol), “mailto” (send electronic mail), “file” (local file), and “telnet.” The *domain.address* defines the domain name address of the computer that the resource is located on. Finally, the *path-name* defines a directory path within the file system of the server that identifies the resource. As used herein, the term “IP address” is intended to refer to the four-byte Internet Protocol address, and the term “Web address” is intended to refer to a domain name address, along with any resource identifier and path name appropriate to identify a particular Web resource. The term “address,” when used alone, is intended to refer to either a Web address or an IP address.

In an exemplary embodiment, a browser, executing on one of the clients 102, retrieves a Web document at an address from one of the servers 104 via the internetwork 110, and displays the Web document on a viewing device, e.g., a screen. A user can

retrieve and view the Web document by entering, or selecting a link to, a URL, such as
"http://www.fhe.com," in the browser. The browser then sends an http request to the
server 104 that has the Web document associated with the URL. The server 104 responds
to the http request by sending the requested Web document to the client 102. The Web
5 document is an HTTP object that includes plain text (ASCII) conforming to the
HyperText Markup Language ("HTML"). Other markup languages are known and may
be used on appropriately enabled browsers and servers, including the Dynamic
HyperText Markup Language ("DHTML"), the Extensible Markup Language ("XML"),
the Extensible Hypertext Markup Language ("XHML"), and the Standard Generalized
10 Markup Language ("SGML").

Each Web document usually contains hyperlinks to other Web documents. The
browser displays the Web document on the screen for the user and the hyperlinks to other
Web documents are emphasized in some fashion such that the user can identify and select
15 each hyperlink. To enhance functionality, a server 104 may execute programs associated
with Web documents using programming languages such as Perl, C, C++, or Java. A
server 104 may also use server-side scripting languages such as ColdFusion from Allaire,
Inc., or PHP. These programs and languages perform "back-end" functions such as order
processing, database management, and content searching. A Web document may also
20 include references to small client-side applications, or applets, that are transferred from
the server 104 to the client 102 along with a Web document and executed locally by the
client 102. Java is one popular example of a programming language used for applets.
The text within a Web document may further include (non-displayed) scripts that are

executable by an appropriately enabled browser, using a scripting language such as JavaScript or Visual Basic Script. Browsers may further be enhanced with a variety of helper applications to interpret various media including still image formats such as JPEG and GIF, document formats such as PS and PDF, motion picture formats such as AVI and MPEG, and sound formats such as MP3 and MIDI. These media formats, along with a growing variety of proprietary media formats, may be used to enrich a user's interactive and audio-visual experience as each Web document is presented through the browser. The term "page" as used herein is intended to refer to the Web document described above, as well as any of the above-described functional or multimedia content associated with the Web document.

Figure 2 shows a block diagram of a preferred embodiment of a server. In this embodiment, the server 104 includes a presentation server 200, an application server 202, and a database server 204. The application server 202 is connected to the presentation server 200. The database server 204 is also connected to the presentation server 200 and the application server 202, and is further connected to a database 206 embodied on a mass storage device. The presentation server 200 includes a connection to the internetwork 110. It will be appreciated that each of the servers may comprise more than one physical server, as required for capacity and redundancy, and it will be further appreciated that in some embodiments more than one of the above servers may be logical servers residing on the same physical device. It will further be appreciated that one or more of the servers may be at a remote location, and may communicate with the presentation server 200 through a local area or wide area network. The term "host," as

used herein, is intended to refer to any combination of servers described above that include a presentation server 200 for providing access to pages by the clients 102. The term "site," as used herein, is intended to refer to a collection of pages sharing a common domain name address, or dynamically generated by a common host, or accessible through a common host (i.e., a particular page may be maintained on or generated by a remote server, but nonetheless be within a site).

The presentation server 200 provides an interface for one or more connections to the internetwork 110, thus permitting more than one of the clients 102 to access the site at the same time. In one embodiment, the presentation server 200 comprises a plurality of enterprise servers, such as the ProLiant Cluster available from Compaq Computer Corp. Other suitable servers are known in the art and are described in Jamsa, Internet Programming, Jamsa Press (1995), the teachings of which are herein incorporated by reference. The server maintains one or more connections to the Internet 110, preferably provided by a tier one provider, i.e., one of the dozen or so national/international Internet backbones with cross-national links of T3 speeds or higher, such as MCI, UUNet, BBN Planet, and Digex. Each enterprise server preferably runs the Microsoft Windows NT operating system, with a "front end" written in Microsoft Active Server Page ("ASP"), or some other programming language or server software capable of integrating ActiveX controls, forms, Visual Basic Scripts, JavaScript, Macromedia Flash Technology multimedia, e-mail, and other functional and multimedia aspects of a page. Typically, the front end includes all text, graphics, and interactive objects within a page, along with templates used for dynamic page creation.

A client 102 accessing an address hosted by the presentation server 200 will receive a page from the presentation server 200 containing text, forms, scripts, active objects, hyperlinks, etc., which may be collectively viewed using a browser. Each page
5 may consist of static content, i.e., an HTML text file and associated objects (*.avi, *.jpg, *.gif, etc.) stored on the presentation server 200, and may include active content including applets, scripts, and objects such as check boxes, drop-down lists, and the like. A page may be dynamically created in response to a particular client 102 request, including appropriate queries to the database server 204 for particular types of data to be
10 included in a responsive page. It will be appreciated that accessing a page is more complex in practice, and includes, for example, a DNS request from the client 102 to a DNS server, receipt of an IP address by the client 102, formation of a TCP connection with a port at the indicated IP address, transmission of a GET command to the presentation server 200, dynamic page generation (if required), transmission of an HTML
15 object, fetching additional objects referenced by the HTML object, and so forth.

The application server 202 provides the “back-end” functionality of the Web site, and includes connections to the presentation server 200 and the database server 204. In one embodiment, the presentation server 200 comprises an enterprise server, such as one
20 available from Compaq Computer Corp., running the Microsoft Windows NT operating system. The back-end software is preferably implemented using pre-configured e-commerce software, such as that available from Pandesic, to provide back-end functionality including order processing, billing, inventory management, financial

transactions, shipping instructions, and the like. The e-commerce software running on the application server 202 includes a software interface to the database server 204, as well as a software interface to the front end provided by the presentation server 200.

5 The database server 204 may be an enterprise server, such as one available from Compaq Computer Corp., running the Microsoft Windows NT operating system and software components for database management. Suitable databases are provided by, for example, Oracle, Sybase, and Informix. The database server 204 also includes one or more databases 206, typically embodied in a mass-storage device. The databases 206
10 may include, for example, sale item pricing information, mailing or e-mailing lists, purchase orders, customer information, product information, news items, and the templates used by the presentation server to dynamically generate pages. In operation, the database management software running on the database server 204 receives properly formatted requests from the presentation server 200, or the application server 202. In
15 response, the database management software reads data from, or writes data to, the databases 206, and generates responsive messages to the requesting server.

Figure 3 shows a home page according to the principles of the invention. It will be observed that the home page 300 relates generally to the topic of shopping, and
20 includes a number of categories 302, which may be shopping categories from which a user may select. A site search engine 304 may be provided, along with links 306 to product reviews, product support, a product browser, a comments site, an ordering site for ordering products and reviewing orders to same, and contact information for the

business providing the home page 300, or a business associated with the home page 300. The links 306 may also include links to any other resources that may be of interest or use to a customer/consumer.

5 Each shopping category 308 may be subdivided into one or more sub-categories 310. For example, the shopping category 308 entitled "Consumer Electronics" may be subdivided into a number of sub-categories 310, such as "Camcorders", "Stereos", "Televisions", "VCR's", and the like. A category entitled "Computers & Software" may be subdivided into "Computers", "Games", "PDA's", "Printers", and the like. A
10 category entitled "Entertainment" may be subdivided into "Books", "CD's", "DVD's", "Movies", "Video Games", and the like. A category entitled "Health & Beauty" may be subdivided into "Cosmetics", "Perfumes", "Vitamins", and the like. A category entitled "Office Supplies" may be subdivided into "Labels", "Paper", "Pens", "Memo Pads", "Toner", and the like. A category entitled "Personal Finance" may be subdivided into
15 "Auto Loans", "Credit Cards", "Mortgages", and the like. A category entitled "Sports & Recreation" may be subdivided into "Golf Equipment", "Kayaks", "Rollerblades", "Skis", and the like. For each category, an "etc." category may be provided for miscellaneous products that do not fit into any of the named sub-categories.

20 The page 300 may include additional features for access from a client, such as a question and answer link 320, a security link 322 that provides additional information concerning security features for the site, quick links 324 to popular or helpful content within the site, resource links 326 to additional resources available, and a user profile link

328 that permits a user to create and edit a personal profile. It will be appreciated that the user profile may be optional, and that in one embodiment, no user profile is required for an interactive product selector according to the invention.

5 The page 300 may be divided into a number of panels, such as a first panel 312, a second panel 314, and a third panel 316, with each panel dedicated to some portion of content. According to the principles of the invention, each panel 312, 314, 316 may be separately accessed by a server, such that portions of the content of the page 300 may be updated without requiring a new page to be transmitted to the client. In one embodiment, 10 panels are defined using HTML frames. In one embodiment, panels are defined divisions that communicate data and program controls between a client and a server using, for example, JavaScript functions.

Figure 4 shows a product selection page according to the principles of the 15 invention. The product selection page 400 relates generally to the selection of features relating to a product, in this case, a personal digital assistant. The product selection page 400 may include features from the home page 300, such as those features shown in the first panel 312 and the third panel 316 of the home page 300. In one embodiment, the second panel 314 may be updated within the originally presented home page 300, thus 20 providing the product selection page 400 without requiring any HTTP navigation to a new page from a client. The product selection page 400 may include one or more screen controls, such as check boxes 402, radio buttons 404 (which may provide for mutually exclusive selection or inclusive selection), and text boxes 406, each corresponding to a

particular product feature. The features may be subjective, i.e., relating to stylistic features, general statements of functionality, and the like, or the features may be objective, i.e., requires an Infrared port, etc. The page 400 may also allow alphanumeric or range inputs, such as a user specified maximum price for the product.

5

In the exemplary product selection page 400 of Fig. 4, product criteria, or features, are displayed for a personal digital assistant ("PDA"). As seen in Fig. 4, a user may select a data entry method, including a stylus pen or a keyboard, optional color screen through a yes and a no radio button, required software, including an address book, a spreadsheet, e-mail/fax capability, a notepad or word processor, web browsing, voice recognition, a scheduler, and a database. A user may also select an optional modem (yes or no selection), optional rechargeable batteries (yes or no selection), screen resolution, including high, medium, or low, and a computer connection method, including docking station, serial cable, USB cable, or infrared connection. A user may enter a maximum price within a text box 406.

10

15

Figure 5 shows a product selection page according to the principles of the invention. It will be observed that the page 500 of Fig. 5 is identical to the page 400 of Fig. 4, except that a radio button 502 labeled "keyboard" has been selected by a user. In response to this selection, information concerning keyboards (and a comparison to a second selection "stylus pen" for the same product criterion ("data entry method")) is provided in a feature description panel 504 on the right side of the page 500. The text

20

may include various comments, set of by bullets. For example, upon selection of the keyboard, the text in the feature description panel 504 may read:

- 5
- Most palm size PDA's use a stylus pen to enter information. The stylus pen enters information by writing on the PDA's display screen.
 - A keyboard will increase the size of the PDA.
 - If you desire the smallest possible PDA then consider choosing one that utilizes a stylus pen.

10 In addition, the feature description panel 504, or a description sub-panel 506 may include information on a product set resulting from the user selection of a particular product criterion. For example, the description sub-panel 506 may state "By selecting this feature you have limited possible PDA choices to 37 products." This text may include a link to a list of the products in the product set. The product set of 37 products may be further qualified, for example, according to product reviews, ratings, price, or the like.

15 Additional selection assistance may be provided, such as an option to choose, for example, a best product at a specified price or at any price, the most fully featured product, or the best value per dollar. These selection options may include subjective or objective features.

20 Fig. 6 shows a product set selected according to the principles of the invention. The product set may be presented as a product set page 600. The product set may be narrowed to a number of products meeting the product criteria specified in the preceding page, for example, the five personal digital assistants shown in Fig. 6. For each product, a picture 602 may be provided that shows the product. A product name 604 may be

25 included, and the product name 604 may be hyperlinked to a description of the product. Further information may be provided for these products, such as a rating 606 that is

provided by an independent, trusted organization or individual, such as Consumer Reviews. An additional rating 608 may be provided that is based on, for example, data collected directly from consumers who have purchased the product. A price 610 may be displayed for the product, which may be a lowest available price from one or more vendors of the product. An explanation link 612 may be included, which a user may select to view why a particular product was included in a product set. This may include a total score for the particular product, and representative statistics for other products in the category.

Other features may be included in the page 600. For example, comparison checkboxes 614 may be provided, so that a user may select a number of products in the product set for a side-by-side comparison. Products in the product set may be sorted according to a user-specified criterion 616, such as name, price, rating, or the like. A user may also specify the number of results to be displayed in each page using a number-of-results setting 618. A price adjustment 620 may be input by a user to raise or lower the product price as a product criterion. A user activate a product refinement link 622 to select a product that most closely suits the users criteria. Each product may be a separate hyperlink, activation of which adjusts a search to more closely match the criteria of the selected product. A back hyperlink 624 may be provided so that a user may return to the previous page. A link to a fulfillment page may also be provided, through which a customer may order a product that has been identified using the product selector. In one embodiment, the fulfillment page may be accessed by a hyperlink for the price 610.

Figure 7 shows a search refinement page according to the invention. The search refinement page 700 may be used to refine a product selection. The search refinement page 700 may be accessed through, for example, the search refinement link 622 of Fig. 6. The page 700 may include a name 702 and a picture 704 of a product used as a basis for refining the product selection. The page 700 may include instructions 706 for a user in refining a product selection. The page 700 may include a product criterion 708, such as a processor speed, a ROM size, a RAM size, a display resolution, a display type (monochrome, color, etc.; touch sensitive), a number a gray shades, number of serial ports, number and type of other ports, type of modem, and the like. For each product criterion 708, a value 710 may be displayed. For example, an amount of ROM may be two megabytes and an amount of RAM may be two megabytes. For each product criterion 708, a user taste 712 may be specified using a checkbox. The checkbox may signify that a user dislikes a value 710 for a product criterion 708, or the checkbox may signify that a user likes a value 710 for a product criterion 708. Where a range of values 710 is available for a product criterion 708, a user may specify a desired range 714. For example, a user may signify with a checkbox that the user dislikes a sixteen megahertz processor, and may indicate as well that a faster processor is desired.

Fuzzy logic may be used to generate a product set based upon the user requirements and subjective tastes submitted during product selection. A fuzzy logic set is a group of objects in which the distinction between members of the set and members not belonging to the set is not precise. Fuzzy logic allows objects to be assigned a degree of membership to a set rather than a simple assignment of group inclusion or exclusion.

In other words, instead of determining whether $x=y$, fuzzy logic can make a determination that x is n degree of y . Alongside the capacity of fuzzy logic to describe the degree of set membership for an object, fuzzy logic can also make inferences based upon imprecise data.

5

For example, within an interactive product selector according to the invention, the user may be asked for a preference concerning a data input method for a handheld computer. The options may stylus and keyboard. The user may choose keyboard and then revise his selection to stylus after reading within the within a feature description panel that a keyboard increases the size of a handheld computer. Hence, a tradeoff has been made. The system, however, when producing a product set, will rank products with a stylus highest, followed by handheld computers that have a screen-based rendering of a keyboard that is used in conjunction with a stylus. The handheld computer would still be small, smallness being an inferred preference given that the user revised his product criterion selection based upon the information received during product selection, yet still have a keyboard feature which was the preference captured during the initial criterion selection. Handheld computers that have only a traditional keyboard may be ranked lowest.

10

15

20

Using fuzzy logic, a system according to the invention may analyze all of the potential members of the product set and create a product set optimized to the user's needs and subjective tastes as well as the limitations of available products. It will be appreciated that fuzzy logic may be applied to a number of product selection steps to

optimize a product set. For example, criteria may be weighted according to the order in which they are selected, whether they have been changed, how they have been refined in the search refinement page 700, what information was provided to a user before selections were changed, and any other information that might be gathered from a user during a user selection process. By gathering data in this manner, a highly optimized product set may be obtained without requiring, for example, a user profile or explicit trade-offs that might otherwise interfere with a user's selection experience.

Figure 8 shows a process for selecting products according to the principles of the invention. Those steps of the process 800 appearing on the left-hand side may occur on a client device. Those steps of the process 800 appearing on the right-hand side may occur on a server. It will be appreciated from the foregoing that, although this represents an embodiment of a client/server process according to the invention, other arrangements of client and server functionality are possible according to the invention. And specific steps of the following process may occur on a client, a server, or both, or the entire process may be usefully employed in a non-client/server environment.

In step 802 of the process 800, a user selects a category and, if appropriate, a subcategory. The category may be any category of good or service such as those described in this description. The selection may be transmitted to the server by explicit action of a user at the client, such as selecting a link from a list of possible categories.

In step 804, a server may generate product criteria in response to the selection of step 802. This may include accessing a product database where products and product information are stored. The product database may include, for each product category, one or more product criteria. For each product criterion, the database may include a question associated with the criterion, a plurality of options for the criterion, a control for selecting one of the plurality of options, selection guidance for each one of the plurality of options, and links to next criteria associated with each one of the plurality of options. The question may include ASCII text, or some other representation of a question that is stored in a manner that may be presented to a human user at a client, and may prompt the user to select one of the plurality of options. The control may include code for rendering a control, or may specify any form of control that may be handled by the client, and may include, for example, a text box, a radio button, a drop-down list, one or more checkboxes, a scroll box, a slider, a dial, and the like. While use of these controls is known for, for example, Windows clients, other custom controls or other physical or graphical user interface controls may be defined for a client and used according to the principles of the invention. Selection guidance may include text of guidance for presentation to a user, along with display parameters such as a location within a page where the guidance is to be displayed, or the selection guidance may include a link or pointer to a location where the text and display parameters are stored. Other display parameters may include font size, formatting, borders, and the like. The links to other questions may be used to dynamically generate a series of questions in response to those criteria specified by a user at any time during the interactive product selection process. An example is provide below of information stored in a product database for a television:

product category: television
 criterion: screen size
 question: What size screen are you looking for?
 options: Under 13", 13"-20", 20"-29", 29"-35", over 35"
 control: checkbox
 guidance: [guidance for each option – see example below]
 next criteria: [links to proceeding criteria and questions for each option]

A narrative form of the information stored in the product database is presented below as a more detailed example of a television selection process. All of the following information may be transmitted from a server to a client in a single transfer for subsequent interpretation by java script or some other event handler on the client side, or the information may be transmitted on an as need basis when, for example, particular options are selected:

1. What size screen are you looking for?
 [Under 13", 13"-20", 20"-29", 29"-35", over 35"]-Checkbox
 {Under 13"} Info-panel name = "Screen Size"
 - ◆ TVs under 13" are good for kitchens, campers and bathrooms.
 - ◆ Smaller screen sizes usually come with fewer added features.
 - ◆ By selecting this option, we will limit your purchase decision questions to those relating to portable TVs.
- {13"-20"} Info-panel name = "Screen Size"
 - ◆ TVs in this range are good for home offices, dorm rooms and playrooms.
 - ◆ Smaller screen sizes usually come with fewer added features.
- {20"-29"} Info-panel name = "Screen Size"
 - ◆ Most TVs that are purchased today fall into this category.
 - ◆ Due to size and weight issues, it is recommended that a dedicated TV stand be used for sizes over 25".
- {29"-35"} Info-panel name = "Screen Size"
 - ◆ Placing a really large TV in a small room can overwhelm such a space.
 - ◆ Viewing distance are traditionally should be around twice diagonal distance.
- {Over 35"} Info-panel name = "Screen Size"
 - ◆ Due to size and weight issues, it is recommended that a dedicated TV stand be used for sizes over 25".

- ◆ Placing a really large TV in a small room can overwhelm such a space.
- ◆ Viewing distance are traditionally should be around twice diagonal distance.

2. What type of TV are you looking for?

[HDTV, SDTV and standard]-Checkbox

{HDTV} Info-panel name = "TV Type"

- ◆ HDTV stands for High Definition Television. It is a standard that produces many lines of resolution per inch.

- ◆ By 2006, the conversion to digital television should be complete.

- ◆ Many broadcasting stations are already sending digital/HD signals.

{SDTV} Info-panel name = "TV Type"

- ◆ SDTV stands for Standard Definition TV. They are comparable to high-quality standard TVs.

- ◆ A standard or SDTV will not be able to handle a digital signal without a component allowing for a digital receiver, for digital connections at a later date.

- ◆ SDTVs do not have the same sound and picture quality as HDTV, but it is much cheaper. If you are thinking of using a DVD player or other digital media source, make sure that your TV can accept digital signals.

- ◆ By 2006, the conversion to digital television should be complete.

- ◆ Many broadcasting stations are already sending digital/HD signals.

{Standard} Info-panel name = "TV Type"

- ◆ Standard TV is not digital and has resolution that is between 250-330 lines.

- ◆ A standard TV will not be able to fully utilize a digital signal due to resolution constraints on the TV itself.

- ◆ A standard or SDTV will not be able to handle a digital signal without a component allowing for a digital receiver, for digital connections at a later date.

3. What type of TV screen do you want?

[Standard, Flat Screen]-Checkbox

{Standard} Info-panel name = "Screen Type"

- ◆ Standard TV screens have a curved picture tube.

- ◆ Curved picture tubes can cause picture distortion on the edges.

- ◆ TV resolution is very important when considering a TV purchase. In the near future, the number of lines of resolution will increase drastically. Currently, broadcast TV has 330 lines, S-VHS tapes have 400 from a pre-recorded video, 330 from broadcast, VHS tapes have 240 and laserdiscs provide 425 lines.

{Flat Screen} Info-panel name = "Screen Type"

- ◆ Flat Screens can offer room-light reduction, higher contrast and color quality, zero picture distortion and wider viewing angles.

- ◆ Flat Screen technology is currently very expensive.

- ◆ Generally flat screens only come in larger TV screen sizes, except for portables.

- ◆ Sony, Panasonic, Mitsubishi and Toshiba provide higher-end Flat TVs that provide higher resolution and realistic viewing experience.

◆ TV resolution is very important when considering a TV purchase. In the near future, the number of lines of resolution will increase drastically. Currently, broadcast TV has 330 lines, S-VHS tapes have 400 from a pre-recorded video, 330 from broadcast, VHS tapes have 240 and laserdiscs provide 425 lines.

4. What video features do you want with your TV?

[PIP, Comb Filters, S-Video ready, Component Video A/V Input/Outputs, Scan velocity modulation, 16:9 Aspect Ratio]-Checkbox

{PIP} Info-panel name = "Added Features"

◆ PIP stands for "Picture-In-Picture."

◆ PIP requires a second video source, such as a VCR. However, some models include a second tuner for the PIP, thus removing the need for a second video source.

◆ Some advanced features that are associated with PIP include multiple PIP screens, PIP size adjusters and input swapping capabilities.

{Comb Filters} Info-panel name = "Added Features"

◆ Comb Filters add better picture quality by filtering out undesirable color patterns.

◆ Comb Filters can either be glass or digital. Digital offers higher picture quality.

{S-Video} Info-panel name = "Added Features"

◆ S-video is a component input that allows for higher resolution inputs.

◆ S-video readiness is an important feature to have if you are considering using DVD players or other digital devices with your TV. This capability will allow for higher resolution between devices.

{Component Video A/V Input/Outputs} Info-panel name = "Added Features"

◆ Component video A/V input/outputs provide higher levels of resolution over S-VHS (around 500 or more lines).

{Scan Velocity Modulation} Info-panel name = "Added Features"

◆ Scan velocity modulation adjusts the rate that the beam draws scan horizontal lines. This gives black-white picture transitions more bite, resulting in sharper picture quality.

{16:9 Aspect Ratio} Info-panel name = "Added Features"

◆ 16:9 Aspect ratio TVs gives the widescreen effect without the black bars found on the top and bottom of the picture.

5. What extra features do you want?

[Stereo Sound, Surround Sound, Front A/V Jacks, Dual-Antenna Inputs, Parental Lock/ V-Chip, Cable-ready]-Checkbox

{Stereo Sound} Info-panel name = "Added Features"

◆ Stereo sound is sound that is sent through two different sound channels resulting in more realistic sound.

◆ Most TVs come with stereo sound (two-channel sound), except for some smaller sets (under 13" category).

{Surround Sound} Info-panel name = "Added Features"

◆ Surround Sound is a feature that comes in two packages. The first utilizes the on-board speakers to create a psycho-acoustic effect.

◆ The second requires extra speakers. Often a TV that incorporates this feature has underpowered amps. (A few models do not have this drawback.) Even at 10 amps/channel (for 20 watt amps), the intended sound effects are minimal at best.

◆ In most cases, Surround Sound enabled TVs have input/outputs for an A/V receiver and/or center-channel inputs.

{ Front A/V Jacks } Info-panel name = "Added Features".

◆ Front A/V jacks allow for you to easily plug in cables from camcorders or video game consoles.

{ Dual-Antenna Inputs } Info-panel name = "Added Features"

◆ Dual-Antenna inputs allows for easy switching between antenna feeds and cable/satellite signals. Also a good feature to have if you want to fully utilize PIP.

◆ PIP stands for "Picture-In-Picture."

{ Notch Filter } Info-panel name = "Added Features"

◆ Notch Filters remove some unnecessary color information.

◆ A drawback of this feature is a slight reduction in resolution.

{ Invar Shadow Masks } Info-panel name = "Added Features"

◆ Invar shadow masks counteract the effects of "blooming" (or bleeding color "halos").

◆ This is considered to be a high-end feature.

{ V-Chip and Parental Lock } Info-panel name = "Added Features"

◆ V-Chip and Parental lock will allow you to "lock out" certain channels or programming.

◆ V-Chip and Parental lock functions are good for people with children, but provide little added benefit for those that do not.

{ Cable-ready TV } Info-panel name = "Added Features"

◆ Cable-ready TVs allow for a TV to accept cable signals without the need for a cable box. However, premium channels and pay-per-view functions are still only possible with a cable box.

6. What kind of remote control do you want?

[Standard, Universal, Learning]-Checkbox

{ Standard } Info-panel name = "Remote Type"

◆ A standard remote has only the features of the TV. It cannot control other devices.

◆ If you plan on adding components, it might be better to look into TV's with either the Universal or Learning remote.

{ Universal } Info-panel name = "Remote Type"

◆ Universal remotes can control other A/V devices, such as VCRs, Cable boxes, etc.

◆ If you plan on adding components, it might be better to look into TV's with either the Universal or Learning remote.

{ Learning } Info-panel name = "Remote Type"

- ◆ Learning remotes allow you to “teach” it by IR sensor, the codes for other components.
- ◆ If you plan on adding components, it might be better to look into TV’s with either the Universal or Learning remote.

5

7. What is the maximum that you want to pay for your TV?-Text box

When information is provided for one of the options, other criteria and questions

10 may be changed and/or reordered. For example, where question 1 above is answered by selecting a screen under 13”, questions 2, 3, and 6 may be eliminated completely.

Question 4 may have modified options and be renumbered to question 2. Question 5 may have its options changed and may be renumbered to question 3. This reordering may be controlled by information stored within the product database, or may be controlled by application logic on the server side or the client side of the interactive product selector.

15

Where the information to control question alterations is stored within the product database, it may be transferred to the client when a first question is transferred, or it may be transmitted when an option is specified at the client. The following is an example of the order of questions which may result from a user selection of screen under 13”:

20

1. {Under 13”} Info-panel name = “Screen Size”
 - ◆ TVs under 13” are good for kitchens, campers and bathrooms.
 - ◆ Smaller screen sizes usually come with fewer added features.
 - ◆ By selecting this option, we will limit your purchase decision questions to those relating to portable TVs.

25

2. What video features do you want with your TV?
[S-Video ready, Component Video A/V Input/Outputs, 16:9 Aspect Ratio]-
Checkbox

30

- {S-Video} Info-panel name = “Added Features”
 - ◆ S-video is a component input that allows for higher resolution inputs.
 - ◆ S-video readiness is an important feature to have if you are considering using DVD players or other digital devices with your TV. This capability will allow for higher resolution between devices.

35

- {Component Video A/V Input/Outputs} Info-panel name = “Added Features”

◆ Component video A/V input/outputs provide higher levels of resolution over S-VHS (around 500 or more lines).

{16:9 Aspect Ratio} Info-panel name = "Added Features"

◆ 16:9 Aspect ratio TVs gives the widescreen effect without the black bars found on the top and bottom of the picture.

3. What extra features do you want?

[Stereo Sound, Cable-ready]-Checkbox

{Stereo Sound} Info-panel name = "Added Features"

◆ Stereo sound is sound that is sent through two different sound channels resulting in more realistic sound.

◆ Most TVs come with stereo sound (two-channel sound), except for some smaller sets (under 13" category).

{Cable-ready TV} Info-panel name = "Added Features"

◆ Cable-ready TVs allow for a TV to accept cable signals without the need for a cable box. However, premium channels and pay-per-view functions are still only possible with a cable box.

4. What is the maximum that you want to pay for your TV?-Text box

The product database may be realized using any database or relational database system, such as Oracle 8, SQL, MySQL, or any other database system. The client-side display may be micro-segmented to include display control for each of the criteria and questions in the product database. A group of the criteria and associated questions and options, may be displayed according to options selected by a user. The group of criteria and questions may be re-ordered, or questions may be removed from the display, or added to the display to produce a new group of criteria. Control of which questions are displayed may be embedded within a page on the client-side, or control of which questions are displayed may be provided by the server and passed to, for example, JavaScript event handlers on the client side. Control may be directed by specifying an ordered list of questions, with display of the questions handled autonomously by the page, or control may be directed by specifying which questions should be visible and where they should appear within the page.

Returning to the process 800 of Fig. 8, once product criteria have been generated in step 804, the process 800 may proceed to step 806 where a user may specify an option for a product criterion. This may be performed using, for example, the control and options provided from the product database. An option may also be presented to a client as, for example, a hyperlink.

When a user specifies an option, the process 800 may proceed to step 808 where criterion information is generated for the option. In an embodiment where selection guidance has been transmitted to the client, this step may include displaying the selection guidance. Where selection guidance information resides on the server within the product database, the page in which the product criterion and options are displayed may generate a request to the server for the selection guidance. The selection guidance information may then be transmitted from the server to the client where it may be placed in a panel within the page.

Additional information may be generated in response to an option specified in step 806. For example, a product set may be dynamically maintained, and the number of products within the product set may be updated in the page each time that an option is specified or revised for a product criterion. In this manner, a user may continue specifying options until the user determines that a manageable number of products are in the product set, for example, a sufficiently small number of products for the user to review each product of the product set individually. As described above, the product set

may also be revised through an application of fuzzy logic to the options specified and the order or manner in which they were specified and/or revised.

In step 810, a user at the client may review information for an option. Upon reviewing information for the option, such as the selection guidance information, the user may choose to revise the choice, as shown in step 812, and return to step 806 where a new option is specified for the product criterion. The user may then submit the selection options, as shown in step 814. If the user does not submit the form, the user may specify an option for a different product criterion, or revising any existing options until the user is ready to submit the form. It will be appreciated that the form submitted in step 814 may be an HTML form, or any other data structure or protocol that may be used to transmit information from a client to a server, or to a different process on the client.

During the process 800, each option specified, and each revision of an existing option selection, may be stored and processed to more precisely adapt a product set to a particular user. For example, when an option is specified, application logic at the client or at the server may assign a priority to the option, as well as to predetermined other options that may relate to the selected option. The application logic may also assign priorities to one or more other features which are not available as explicit option selections, but which may be inferred from an option selection or selections, such as a preference for a product size or style. These priorities may be used in a fuzzy logic or other system to revise the product set. Further, where an option is revised, the application logic may reduce the weight of the previous option rather than deterministically removing

all products with the previous option from the product set. In an alternative embodiment, the application logic may infer that the previous option is disliked by a user, and apply a strong negative weight to the previous option, such that products with options similar to the previous option are also removed from a product set. Any such weighting or other
5 decision-making may be implemented in the application logic used to generate a product set.

When a form is submitted in step 814, a product set may be generated, as shown in step 816. It will be appreciated that not all product criteria need to be specified for a
10 form to be submitted. For example, a user may specify only those options that are important to the user, or the user may continue to specify options until the number of products in the product set drops below some number. Generating a product set according to step 816 may include collection of information for presentation at the client, such as product reviews, product ratings, prices, and any other information that may be
15 relevant to a consumer of the product.

In step 818, the product set is displayed to a user. The display of a product set may include, for example, a page such as the page 600 shown in Fig. 6.

20 Figure 9 shows a product set generation process according to the principles of the invention. As shown in Fig. 9, a product set generation process 900 may be used to prioritize and constrain a product set before the product set is provided for display to a user. In step 902, a form is submitted that includes all options specified by a user. The

form may be, for example, an HTML form, or any other form or other medium for communicating data to the product set generation process 900.

In step 904, a preprocessed product set is assembled. The preprocessed product set may be generated by, for example, filtering a database of products with suitable queries.

In step 906, the preprocessed product set is checked to determine whether the set contains any members. If no members are contained in the preprocessed product set, then the process 900 may proceed to step 908 where a message is generated. The message may be text indicating that no products exist for the presently selected options, and may include formatting or other information used to control display of the message at a client device. If there are one or more products in the preprocessed product set, then the process 900 may proceed to step 910.

In step 910, a sorting algorithm is applied to the preprocessed product set to generate a sorted product set that establishes an order in which the product set will be displayed to a user. This may include a weighting of various options selected by a user, with each option being provided a weight according to, for example, an order in which the option was selected, or a fuzzy logic weighting such as that described above. The weighted options may then be added together to generate a score for each product. The inputs to, or outputs from, the fuzzy logic system described above may be used during sorting of the preprocessed product set. Sorting may instead be performed according to

other factors. For example, the product set may be sorted according to manufacturer, consumer rating, or price. In addition, several tiers of sorting may be applied, so that the list is sort first according to how well products have met user-specified options, e.g., by the score for each product, and then by price for those products having equal scores. It will be appreciated that the above examples are not exhaustive, and that other sorting algorithms or procedures may be used with an interactive product selector according to the principles of the invention.

In step 912, a price threshold may be applied to the sorted product set. The price threshold may be, for example, a price threshold entered into a textbox such as the textbox 406 shown in Fig. 4. The product set may be filtered to remove those products having prices above the price threshold. Other filtering mechanisms may be used to produce the product set. For example, the product set may be limited, by user specification or otherwise, to a maximum number of products. After the threshold has been applied, the product set may be returned, as shown in step 914. Where a user is at a remote, client device, this may include transmitting the product set over a network to the client device. In step 914, the product set may also be formatted for display by a client device.

It will be appreciated that, although each of the steps in Figs. 8-9 may be associated with one of the user, the client system, and the server system, different portions of the process may be performed at different locations. Furthermore, certain steps may be added or omitted without departing from the scope of the invention. Each

of the steps in Figs. 8-9 may be implemented through one or more programming languages suitable to a networked, client/server environment, or to any other environment or platform on which the interactive product selector might be deployed. In one embodiment, the product selector uses HTML or XML pages containing Java Server
5 Page and Java Script elements. The server system may be multi-tiered, including a database server, a business logic server, and a presentation server. The business logic may be implemented as Java objects.

While the pages and selection processes shown above have related to selection of
10 consumer goods including personal digital assistants and televisions, it will be appreciated that different products, including any goods or services, may be selected using the above system. In one embodiment, a financial instrument selector may be provided. Categories of financial instruments may include, for example, equities, bonds, mutual funds, money market funds, and the like. A selector may be provided for
15 choosing from among these categories using, for example, risk, taxation, rate of return, investment objectives, liquidation scenarios (e.g., retirement, home purchase, 5 years, 10 years, etc.), and the like. Within each category, further criteria may be provided. For example, with mutual fund selection, criteria may include sectors, historical rate of return, load or fees, size of fund, fund objectives, and the like. For equities, the selector
20 may include criteria for price, price/earnings ratio, historical and/or projected growth rates, market capitalization, analyst ratings, and any other information, which might be used by an investor. For each selection, guidance may be provided concerning that selection, and changes in selections will also be tracked so that they may be used to

provide product sets responsive to a user's interests or concerns. During the selection process, a second panel may be dynamically updated to show the user the number of selections conforming to the user's criteria.

5 While the invention has been disclosed in connection with the preferred embodiments shown and described in detail, various modifications and improvements thereon will become readily apparent to those skilled in the art. Accordingly, the spirit and scope of the present invention is to be limited only by the following claims.

10 What is claimed is:

00E120" 22E1560